

Number: E 1042.00

/s/ Paula J. Hammond
Secretary of Transportation

Date: July 1, 2008

Project Management and Reporting System (PMRS)

I. Introduction

The Washington State Department of Transportation (WSDOT) has implemented the Project Management and Reporting System (PMRS) including the project Electronic Content Management (ECM) system to assist with managing and reporting the status of Capital Transportation Project delivery. This policy supplements Executive Order E1032.01 *Project Management* dated July 1, 2008.

II. Secretary's Executive Order

WSDOT employees are directed to use the PMRS, including project ECM, as the agency wide project management and reporting tools supporting Capital Transportation Project delivery. The PMRS replaces the Project Delivery Information System (PDIS).

III. Benefits of PMRS and ECM

The PMRS, including project ECM, provide WSDOT managers with current business practices and tools to assist with making effective and efficient business decisions based on improved management of project scope, schedule, and cost. Project information is current, easily accessible, transparent, consistent, accurate, and facilitates improved forecasting capabilities, proactive problem resolution, and improved communication. Specific benefits provided by the PMRS include:

- A state of the art project management system, utilizing the most current and effective project management tools in the industry.
- A statewide work breakdown structure that is scalable to project size and complexity that facilitates progress report summaries at the regional and agency levels.

- Tools that enable project team members, including specialty groups, to monitor and efficiently update project activities.
- Resource analysis and management tools for hands on practitioners and managers to better evaluate project status and develop early workable solutions.
- Earned value management capability to provide early warning of project cost and schedule issues to facilitate corrective action including tools to calculate estimates to complete and estimates at completion for regularly forecasting project costs.
- Expanded project cost and schedule reporting capabilities scalable to project size, complexity, and visibility.
- Cost estimating tools to enable project managers to better develop and analyze cost estimates using a variety of formats and levels of detail depending upon project management needs and the stage of the project including engineer's estimates and construction change orders.
- A uniform, statewide structure for efficient filing, retrieval, processing, sharing, and retention of agency documentation.
- Consistent, streamlined statewide progress reporting from a single data source that reduces the effort required by the region for preparing standard progress reports.
- Electronically linked financial and project management systems to better streamline data handling and transfer, and to further streamline reporting and analysis across the state.
- A more efficient change management process that will reduce preparation time and effort, and streamline the approval process through automated processes.

IV. Definitions

A. Project Management and Reporting System (PMRS)

The enterprise project management and reporting system integrates schedule, contract management, electronic content management, cost control/earned value, and cost estimating with existing WSDOT legacy systems to better support management and delivery of capital projects. Project Electronic Content Management (ECM) is the electronic system used to satisfy document filing and retrieval, business process management (workflow), records management, and retention requirements.

V. Implementation: Pre-Integration

Pre-Integration is defined as the stand alone deployment of the individual PMRS tools. For existing capital projects, the following guidelines should be used when considering moving projects into PMRS. These are minimum guidelines. Other projects may be migrated into PMRS as desired by regional management. The general migration criteria that applies to the following sections of this Secretary's Executive Order includes:

A. PMRS Requirements for Pre-Integration

After the date of the first PMRS deployment in the region, PMRS is required for the following:

1. All new projects with a preliminary engineering (PE) phase start.
2. All existing projects that transition to the construction phase (implementation as of the start of the construction phase).

B. Recommendations for PMRS Pre-Integration

After the date of the first PMRS deployment in the region, PMRS is recommended for the following:

1. Existing projects in the design phase with at least 12 months remaining prior to ad.
2. Existing projects that are early in the construction phase with at least 12 months remaining.

C. Other Considerations for Pre-Integration

1. Resource loading is not a requirement of PMRS.
2. Cost loading at the control account level is required but does not require roles or name resources.
3. PMRS configuration will enable generic roles to be utilized for those regions and specialty groups that require role based analysis at the region level. This would require all projects to be included at a minimum of the control account level in the PMRS. Named resources are not recommended or configured for use, but are an option.

VI. Implementation: Integration Requirements

Integration is when all of the individual PMRS tools are connected together and the web portal is available. The following requirements for PMRS integration apply to all capital projects and programs throughout WSDOT:

A. When and What

1. By June 1, 2010, all projects/all phases must be in PMRS.
2. All new projects started after the date of the first system integration must be in PMRS.

B. PMRS Use

1. Use the PMRS for schedule, cost control, earned value, agreement/contract management, cost estimating, and document control and reporting to perform standard project management functions.
2. By the tenth of each month, ensure status is up to date for active projects (schedule, cost, and earned value) through the last business day of each preceding month. Status is defined as updating schedule activities, physical percent complete and estimate at completion.
3. Use PMRS as the data source for WSDOT internal and external project delivery reports.

C. Electronic Content Management (ECM)

Use project ECM for all project content management and document control needs as required by the project ECM procedures.

D. Work Breakdown Structure (WBS)

Use the WSDOT standard work breakdown structure for all PMRS tools and incorporate a minimum of one control account per project phase. Refer to WBS and control account guidelines on the *Project Management Website* <http://www.wsdot.wa.gov/Projects/ProjectMgmt> for assistance.

E. Schedule Development and Management

1. Schedule Development

Build capital projects' schedules for all new projects in the PMRS. Include activities for the preconstruction and construction phases and the milestones required for the project funding type as specified in the *Project Control and Reporting Manual* M 3026.01.

2. Schedule Templates

Use the schedule templates guideline on the *Project Management Website* <http://www.wsdot.wa.gov/Projects/ProjectMgmt> for recommendations regarding the use of schedule templates.

3. Contractor's Construction Schedule Review and Update

Incorporate a summary level rollup of the accepted construction contractor's schedule into the PMRS master schedule for the construction phase of all capital projects. Follow guidance in the *Construction Manual* M 41-01.

4. Project and Activity Code Management

Forward requests for additions or modifications to standard PMRS activity codes or project codes to the PMRS Code Administrator in WSDOT Headquarters, Olympia, for approval and implementation. <http://wwwi.wsdot.wa.gov/ProjectReporting/>

5. Earned Value

Actively cost load the critical path schedule in accordance with the approved project budget for all projects to enable Earned Value Management and reporting. Download actual costs from the financial accounting system in accordance with the WBS developed for each project.

F. Cost Estimating and Cost Management

1. Estimated Outstanding Costs

Use the estimated outstanding costs guideline on the *Project Management Website* <http://www.wsdot.wa.gov/Projects/ProjectMgmt> for recommendations regarding the use of "estimated outstanding costs" and enter them into the PMRS Cost tool for management and reporting purposes.

2. Estimate at Completion

Provide an Estimate at Completion for all phases of all capital projects included in the PMRS and enter them into the PMRS Cost tool for management and reporting purposes.

3. Cost Templates

Use the cost templates guideline on the *Project Management Website* <http://www.wsdot.wa.gov/Projects/ProjectMgmt> for recommendations regarding the use of cost templates in the PMRS Cost tool.

4. Cost Estimating

Use the *Cost Estimating Guidance Manual for WSDOT Projects* M 3034 issued by the Strategic Analysis and Estimating Office at WSDOT Headquarters, Olympia. <http://www.wsdot.wa.gov/Design/SAEO>

G. Agreement Administration

1. Internal Agreements

Create internal agreements with WSDOT disciplines/specialty groups that identify the scope, schedule, and estimated costs for the deliverables needed for a specific capital project.

2. Agreement/Contract Management

Enter all internal agreements and consultant agreements into PMRS.

Enter construction contracts into the Primavera Contracts tool of the PMRS.

H. Risk Assessment

1. Conduct Risk Analysis

Conduct a risk analysis and prepare and report on a risk management plan as required by the Project Management Online Guide and the Cost Risk Assessment (CRA) Policy
<http://www.wsdot.wa.gov/Projects/ProjectMgmt/RiskAssessment/>.

2. Update Risk Analysis

Regularly update the risk management plan for each project as required by the Project Management Online Guide and the Cost Risk Assessment (CRA) Policy
<http://www.wsdot.wa.gov/Projects/ProjectMgmt/RiskAssessment/>.

I. Change Management

1. Change Management

Use the PMRS to manage all project changes including internal and external agreements and follow the change management process included in the *Project Control and Reporting Manual* M 3026.01 and the *Project Management Online Guide*.

2. Construction Contracts

Construction contract changes will continue to be processed through Construction Contracts Information System (CCIS). The effects of cost and schedule will be tracked through PMRS. More information about CCIS can be found at <http://wwwi.wsdot.wa.gov/eesc/cons/Default.cfm>

3. Project Change Request Form (PCRF)

Use the PCRF included with the PMRS per the established PCRF procedures included in the *Project Control and Reporting Manual* M 3026.01.

J. Status Reporting

Use only the PMRS reports as the standard agency reporting source for programmed capital projects.

VII. Contact for More Information

Project Control and Reporting Office, (360) 705-7152,
<http://wwwi.wsdot.wa.gov/projectreporting/>

VIII. References

- Secretary's Executive Order [Project Management E 1032.01](#) dated July 1, 2008
- [Project Control and Reporting Manual](#) M 3026.01 dated February 2008
- Cost Risk Assessment Policy, under development. Please check the following website for updates <http://www.wsdot.wa.gov/Design/SAEO/>

- Project Management Online Guide
<http://www.wsdot.wa.gov/Projects/ProjectMgmt/Process.htm>
- *Construction Manual* M 41-01
- The following are under development, please check the Project Management Website for updates <http://www.wsdot.wa.gov/Projects/ProjectMgmt/Process.htm>
 - PMRS Procedures
 - PMRS Guidelines
 - PMRS Migration Protocols

IX. WSDOT Assistant Secretary of Engineering and Regional Operations

The Assistant Secretary of Engineering and Regional Operations is responsible for periodic review and updates to this document. All executives are responsible for informing the Assistant Secretary of Engineering and Regional Operations of changes needed for the maintenance of this document.



Americans with Disabilities Act (ADA) Information

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